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TO : Assistant Director, ORE

FROM : Acting Chief, Economics Group, ORE

SUBJECT: Breadgrains in the Soviet Union, Europe, Middle East, and Manchuria

DATE: 14 December 1948

1. Attached is a proposed intelligence memorandum which gives a preliminary appraisal of the 1948-49 breadgrain situation in the Soviet Union, Europe, Middle East, and Manchuria indicating the comparative supply position of the area under Soviet domination in comparison with Western Europe and the Middle East. The 1948-49 situation is also compared with that of 1947-48 and prewar years.

2. The data for 1948-49 are based on early estimates of the 1948 breadgrain harvest and will be subject to some revision as more recent information becomes available. It is planned to revise these estimates at a later date and expand the statement to include corn, barley and oats at which time the complete analysis will be submitted as an ORE report.

3. Even though the 1948-49 estimates are preliminary, they are timely and have significance in assessing the strategic food position in the above areas. It is suggested that copies of this memorandum be distributed to the Munitions Board, Department of the Army (G-2), Department of State (OIR) and the following Regional Branches within ORE: Eastern Europe, Western Europe, Far East, and Near East-Africa.

Encl:
Breadgrain intelligence memo.

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